Who Am I?

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Agenda

- Intro
- What is the Power Platform?
- Using Dialogs
- Replacing Dialogs with Embedded Canvas Apps
- How to Embed a Canvas App on a Model Driven Form
- Other old stuff you should update!
- Q&A

What is the Power Platform?
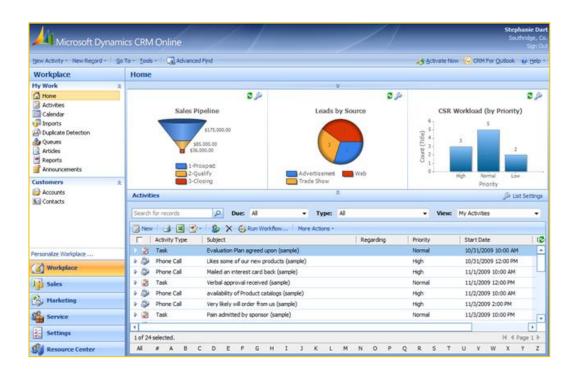
Dynamics CRM: In the Beginning

Microsoft Dynamics CRM

Dynamics CRM
- Sales
- Service
- Marketing

Business Application Layer

Microsoft SQL

Dynamics CRM Online

Dynamics CRM Online

- Sales
- Service
- Marketing

Business Application Layer

Microsoft SQL

AZURE/Office 365

xRM – Unique Line of Business Apps

Unique Line of Business Apps
a.k.a. xRM Applications
"anything" Relationship Management

Dynamics CRM/CRM Online
- Sales
- Service
- Marketing

Business Application Layer

Microsoft SQL

AZURE

xRM – Unique Line of Business Apps

- **Data Entity and Relationships**
- **Multi-user**
- **Web Based**
- **User Security and Authentication**
- **User Interface**
- **Automation (Workflow)**
- **Reporting**
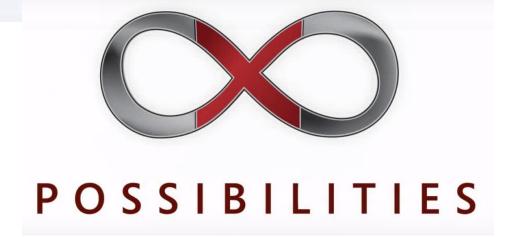- **Integration**
- **Mobile**
- **Etc…**

xRM – Unique Line of Business Apps

xRM

One Platform. Many Applications.

https://youtu.be/Yru5CkANOKA

POSSIBILITIES

Renaming: Dynamics 365
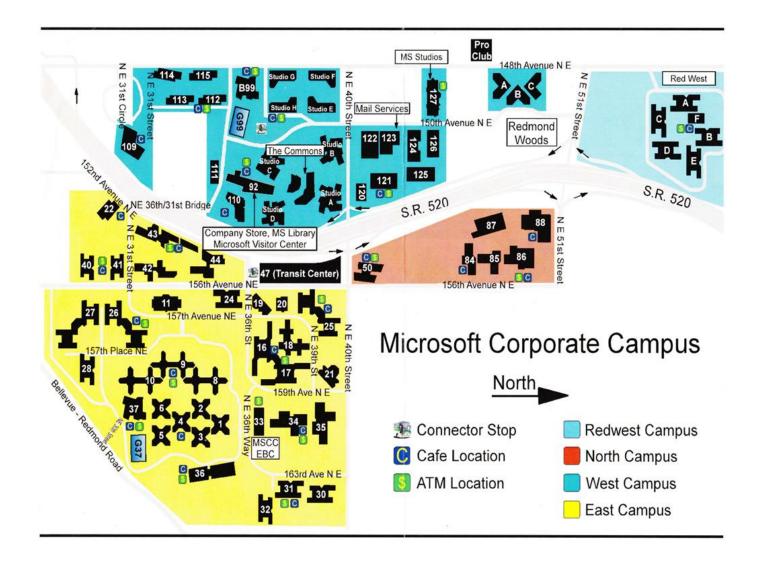
Dynamics 365 (CRM, F&O, Bus. Central)

Microsoft Dynamics 365

Unique Line of Business Apps a.k.a. xRM Applications "anything" Relationship Management	Dynamics 365 Finance & Operations	Dynamics 365 Business Central
Dynamics 365 for Customer Engagement • Sales • Service • Marketing		
Business Application Layer		
Microsoft SQL		
AZURE		
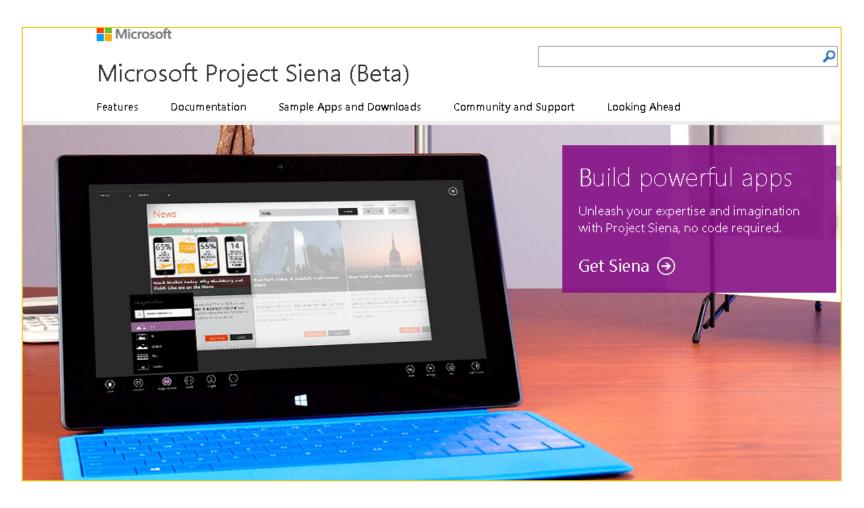
Project Siena

"Classic" PowerApps

PowerApps – low code/no code
● SharePoint
● Office 365
● SQL
● etc
AZURE

Microsoft Flow
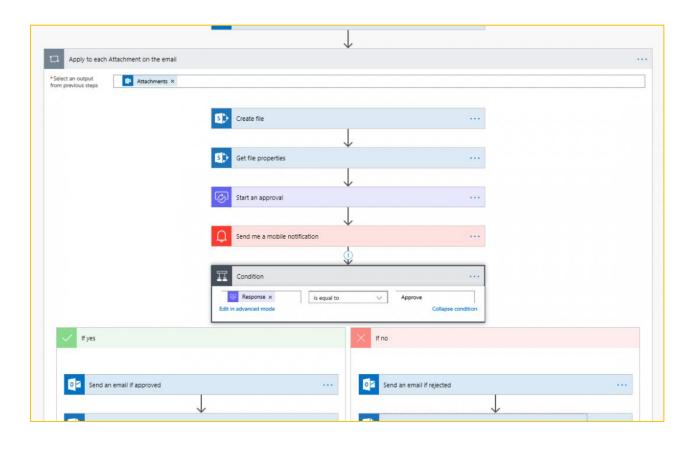
Microsoft Flow

Flow – low code/no code workflows
● SharePoint   ● Office 365   ● SQL   ● Etc
AZURE

PowerBI
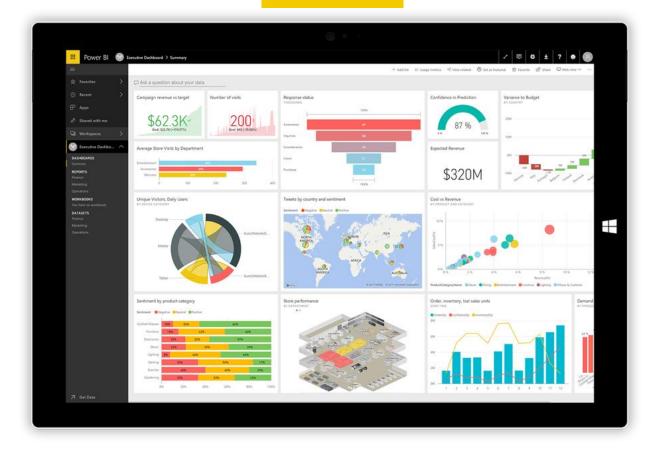
Power BI

Power BI – Reporting
Any data source
AZURE
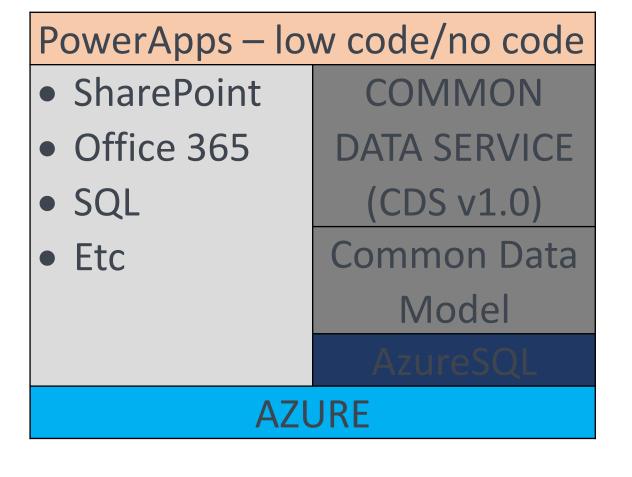
Maybe need a Database with Common Entities…?

Common Data Service

Common Entities like;
- Accounts
- Contacts
- Activities…

PowerApps – low code/no code	
• SharePoint • Office 365 • SQL • Etc	COMMON DATA SERVICE (CDS v1.0)
	Common Data Model
	AzureSQL
AZURE	

What can we do with this new tech?

PowerApps – Unique Line of Business Apps

- Data Entity and Relationships
- Multi-user
- Web Based
- User Security and Authentication
- User Interface
- Automation
- Reporting
- Integration
- Mobile
- Etc…

What can we do with this new tech?

Unique Line of Business Apps	
PowerApps – low code/no code	
• SharePoint • Office 365 • SQL • Etc	COMMON DATA SERVICE (CDS v1.0)
	Common Data Model
	AzureSQL
AZURE	

Wait a minute... don't we have that already?
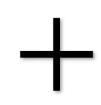
Dynamics 365, PowerApps, Flow, Power BI – Better together!
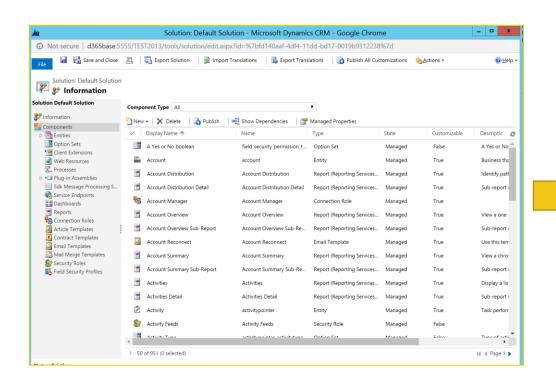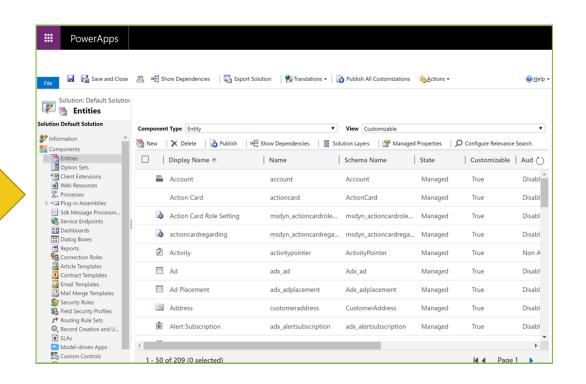
Dynamics 365, PowerApps, Flow, Power BI – Better together!

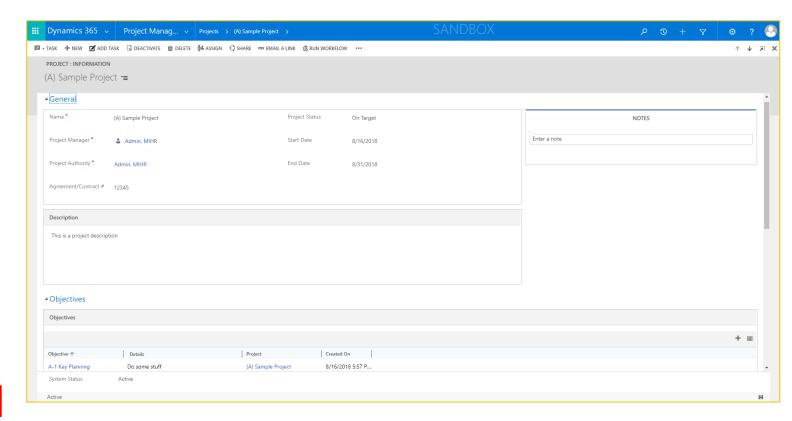# Overnight, we all became PowerApps Experts!

The Power Platform

Terminology

- Classic Web Interface
- Unified Interface
- Canvas App
- Model Driven App
- PowerApp Component Framework control

Classic Web Interface

- Existing "CRM" style interface
- Build for Web Browsers
- Tricky to navigate
- Lots of white space
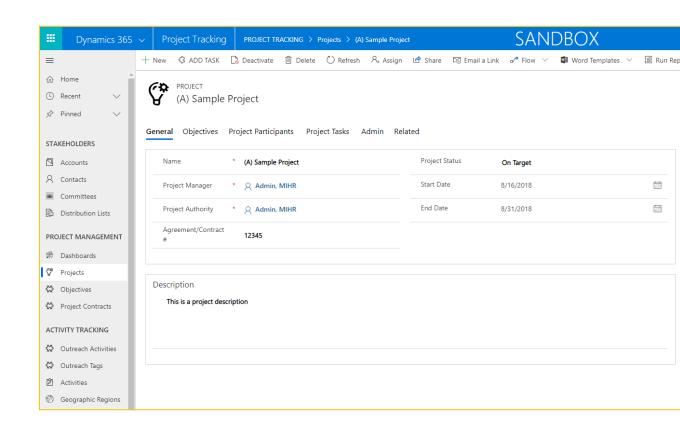- Introduced in CRM 2013
- ~~Will be~~ **deprecated October 2020!**

Unified Interface

- New, updated "CRM" style interface
- Scales to different layouts
- Faster
- Side Navigation, Tabs (remember CRM 2011?)
- Default experience moving forward
- **Does not support Dialogs**

Canvas App

- Traditional "PowerApp"
- Extremely flexible layout
- Variety of devices (web, mobile, etc)
- 100s of Connectors (including CDS)
- Constantly evolving
- Great for "single task" type applications
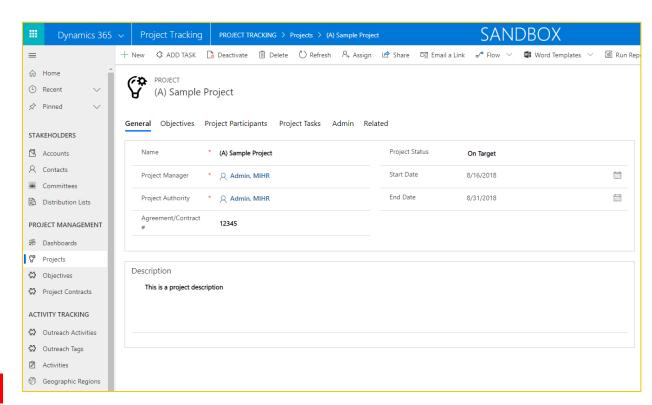- Can be embedded in Model Driven

Model Driven App

- Traditional "CRM" style interface
- Entities, Views, Forms
- Standard Layout
- Backend is CDS database
- Build line of business apps quickly
- Admin or complex applications
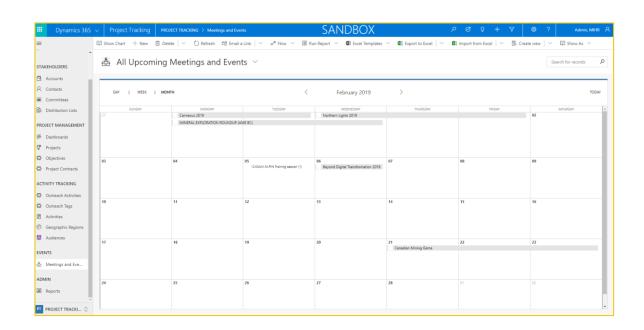- Dynamics 365 CE is a model driven app

PowerApps Component Framework

- Customized User Controls for Model Driven Apps
- Allows developers to create customized user experience controls
- Some created by Microsoft, many created by community
- Embedded Canvas App is type of Control
- Other examples are editable grid, calendar control, etc.

https://pcf.gallery

Dialogs

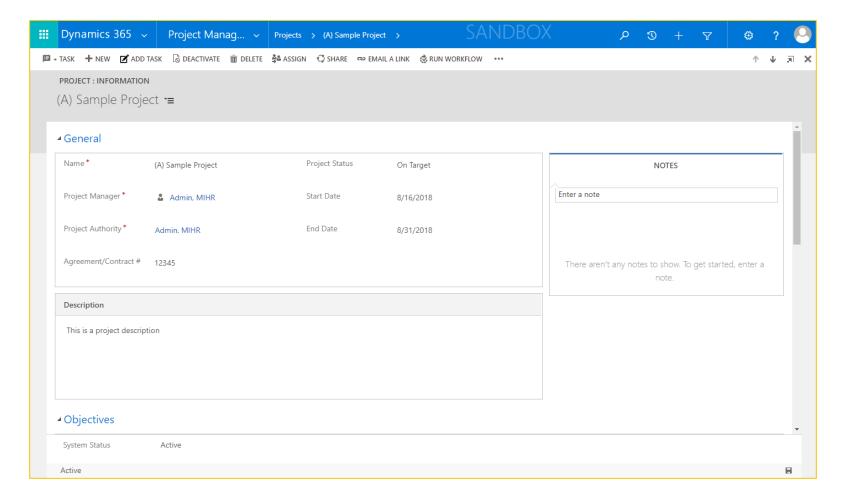- Workflows with user interaction
- Use Case – Project Task Tracking
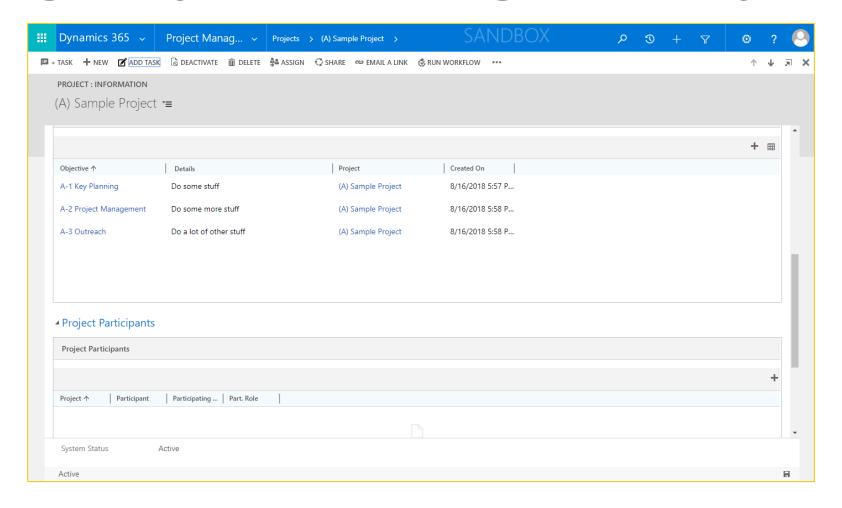
The "Old Way" – Using Dialogs in the Classic Web App
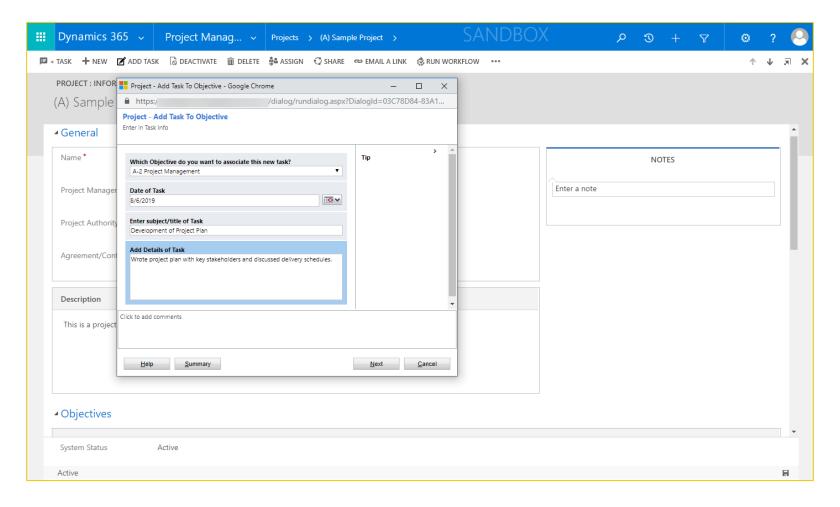
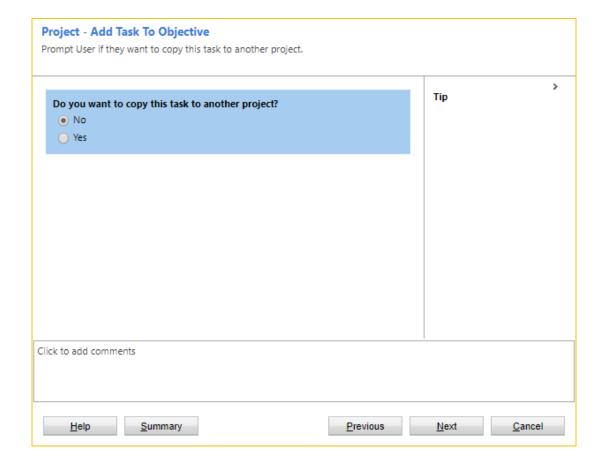# Task Tracking Against Project

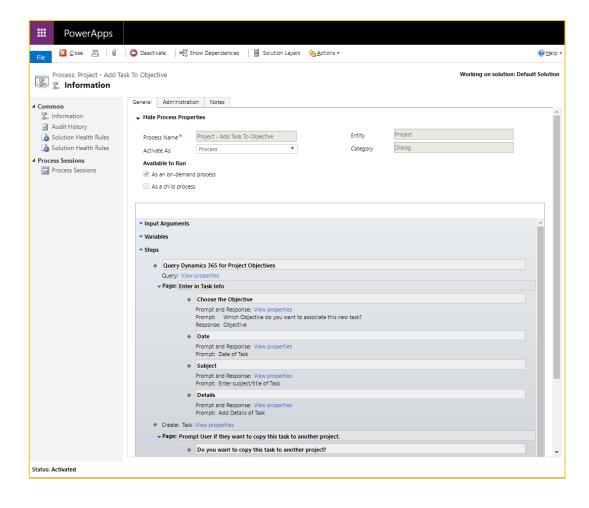# Adding Project Tasks Against Objectives

Adding Project Tasks Against Objectives

Copy Project Tasks to other projects

Building a Dialog

Accomplishments

- Reduced clicks
- Easier for end users to understand
- Accurate reporting

Going Forward

- Dialogs have been deprecated
- Unified Interface
- Dialogs were never that pretty anyway

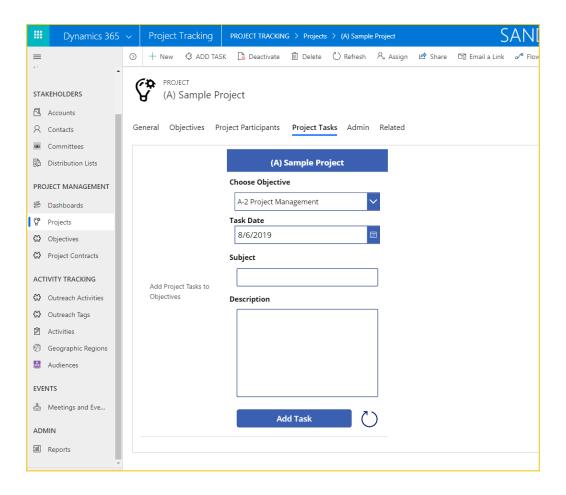# The "New Way" – Using an Embedded Canvas App
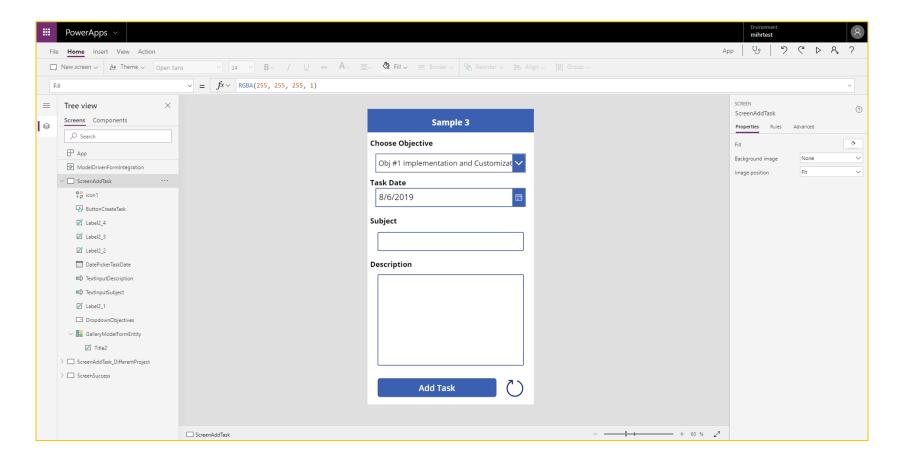
The "New Way" – Using an Embedded Canvas App
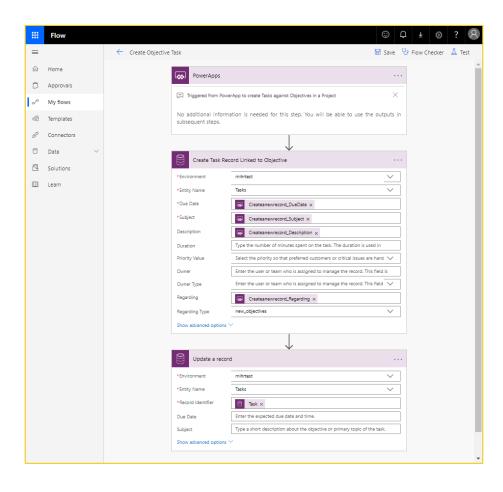
Embedding a Canvas App on a Model Driven Form

Embedding a Canvas App on a Model Driven Form

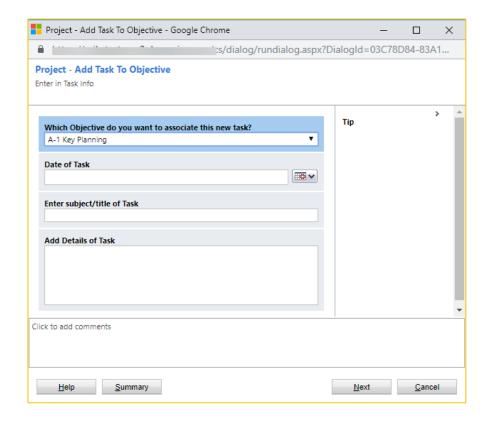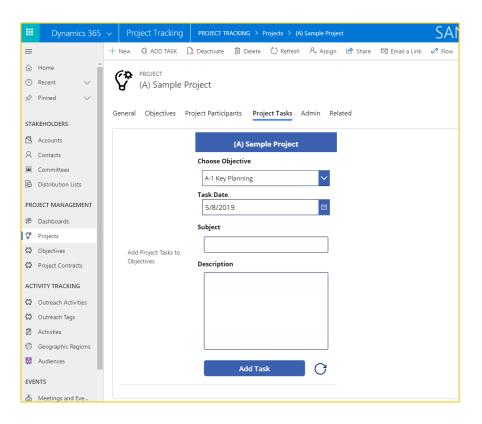# Challenges – Writing Data back to CDS – Flow solution

Preference?

Other stuff you should replace

- Use Flows instead of Workflows
- Unified Client instead of legacy web client (must do before October 2020)
- Online instead of on-prem
- PCF Controls vs Web Resources
- Outlook App instead of Outlook Client
- PowerBI vs SSRS?

Tips/Advice?

- There is no "conversion tool" Challenge, anyone? (XrmToolBox tool?)
- Good Opportunity to Redesign User Interactions
- Not the only way; Business Process Flows, Custom PCF Controls, or just Flow

- Update to the new Unified Interface. Now. Seriously. Go do it!
- Always start with Flow instead of Workflows.
- New projects, consider vanilla CDS instances, but caution that there is no upgrade path currently to Dynamics 365

- Budget time *weekly* to review new features or updates!

Any Questions?

DYNAMIC COMMUNITIES